DOCUMENT RESUME

ED 451 343 CE 081 465

TITLE	CareerLink System and Chartering Process Guide.
INSTITUTION	Pennsylvania State Dept. of Labor and Industry, Harrisburg.
PUB DATE	2000-10-00
NOTE	40p.; Prepared by Team Pennsylvania Workforce Investment Board and CareerLink Bureau.
AVAILABLE FROM	For full text: http://www.paworkforce.state.pa.us/careerlink/download/chartering _guidebook_10122000.pdf.
PUB TYPE	Guides - Non-Classroom (055)
EDRS PRICE	MF01/PC02 Plus Postage.
DESCRIPTORS	Administration; *Agency Role; Certification; Check Lists; Definitions; Evaluation Criteria; Guidelines; Information Dissemination; Information Management; Job Training; *Labor Force Development; Leadership; Participant Satisfaction; Postsecondary Education; Public Policy; Quality Control; *State Agencies; *State Programs; *Statewide Planning; Strategic Planning; User Satisfaction (Information); Vocational Education
IDENTIFIERS	*Chartering Process; Pennsylvania

ABSTRACT

This guide is intended to bring all the policy and tools approved by the Pennsylvania State Workforce Investment Board (SWIB) into a single reference for local workforce investment board (LWIB) members involved in chartering. Part 1 lists the guiding principles and benefits of Team Pennsylvania CareerLink, which is Pennsylvania's one-stop system. Part 2 outlines the SWIB's vision for chartering. Part 3 describes the roles of the SWIB, LWIB, and CareerLink Bureau. Part 4 contains information about the following topics: comprehensive sites; mini-centers; access points; and minimum chartering criteria and measures. Part 5 is a chartering process and site checklist for the five stages of the chartering process. Part 6 is a quality assurance tool that is designed to monitor and evaluate chartered CareerLink sites from the following standpoints: leadership; information and analysis; strategic planning; human resources development and management; process management; business results; and customer focus and satisfaction. The following items are included in Part 7: (1) 11 pertinent definitions; (2) lists of core, intensive, and training services available to job seekers and to employers; (3) flowcharts illustrating the CareerLink site development process and site re-chartering process; and (4) answers to 22 frequently asked questions regarding chartering. (MN)

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TEAM Pennsylvania CareerLink

CAREERLINK SYSTEM AND CHARTERING PROCESS GUIDE

October 2000

Governor Tom Ridge

Secretary of Labor & Industry
Johnny J. Butler

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TABLE OF CONTENTS

Introduction	Page 4
State WIB Vision for Chartering	Page 5
Role of SWIB, LWIB and CareerLink Bureau	Page 6
Chartering Policy	Page 8
Minimum Chartering Criteria	Page 12
Site Checklist	Page 16
Quality Assurance Process	Page 18
Definitions	Page 23
Types of Services	Page 24
Flow Charts	Page 27
FAQ	Page 29

PURPOSE OF THE GUIDE:

The purpose of this guide is to bring all the policy and tools approved by the State Workforce Investment Board into one handy reference for Local Workforce Investment Board (Local WIB) members involved in chartering.

Included are minimum guidelines that must be a part of the local chartering process. In a clear, concise manner this guide provides the Site Checklist needed by Local Workforce Investment Boards when conducting chartering site visits, and reviews the Quality Assurance Process to be used by the Team Pennsylvania Workforce Investment Board and ***CareerLink*** Bureau to ensure minimum standards are met and the ***CareerLink*** brand name is protected.

HOW THE GUIDE IS ORGANIZED:

Part One: Introduction
Part Two: State WIB Vision for Chartering
Part Three: Role of SWIB, LWIB and ***CareerLink*** Bureau
Part Four: Chartering Policy
- Minimum Criteria

Part Five: Chartering Process
- Site Checklist

Part Six: Quality Assurance Process
Part Seven: References
- Definitions
- Services
- Flow Charts
- FAQ

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PART ONE

INTRODUCTION

The guiding principles of **Team Pennsylvania *CareerLink,*** Pennsylvania's One-Stop System, are:

- ***CareerLink*** is a business for employment and training services;
- ***CareerLink*** Partners are business partners who share risks, responsibilities, information and costs;
- ***CareerLink*** is a customer-focused business where decisions will be made based on how it will benefit the customer not the individual partners' organization; and
- ***CareerLink*** partner will focus on what they can do rather than what they can not do.

The ***CareerLink*** Chartering Process was developed by the Team Pennsylvania Human Resources Investment Council (renamed the Team Pennsylvania Workforce Investment Board in February 2000) and included in the State's Title I WIA plan as the **minimum** requirements for Local Workforce Investment Board Chartering Policies. Twenty-seven ***CareerLink*** sites were chartered by the Council prior to January 1, 2000 when the chartering responsibility was transitioned to the Local Workforce Investment Boards. The Chartering of a site ensures:

- the establishment of a systemic vision for high quality service;
- the establishment of brand name standards;
- the establishment of concrete expectations for operational readiness standards;
- that the system will continually improve by increasing performance expectations for outcomes and customer satisfaction; and
- the process is framed by the Baldrige quality criteria, a system proven effective in the public and private sector.

CareerLink has the people, commitment and skills to be a world-class organization. By adopting the Baldridge criteria, the organization achieves the focus necessary to realize its full potential. Baldridge is the guide to continuous improvement, which will lead to more satisfied customers, happier employees, increased productivity, smarter business practices and long-term survival. In adopting a Baldridge-based chartering process for ***CareerLinks*** the Team Pennsylvania Workforce Investment Board ensures the ***CareerLink*** brand name will represent quality and a world class motivation to do things right!

PART TWO

THE STATE WIB VISION OF CHARTERING

The vision of Pennsylvania's workforce investment system is to develop a world-class workforce development system which complements the Commonwealth's overall education and economic strategy and guides federal, state and local resources in a customer focused and user friendly manner that promotes a high quality, globally competitive workforce.

The delivery of workforce services will be provided through a seamless integrated system, **Team Pennsylvania *CareerLink*,** to ensure greater performance and accountability through system-wide measures. All customers, both job seekers and employers, will be served through a state of the art delivery system that capitalizes on the efficient use of the latest technology and effective services provided by cross-trained, responsive customer service teams conveniently located in communities across the Commonwealth.

Chartering is the approval process the Local WIB applies to measure the ability of a one stop operator to oversee a site using the **Team Pennsylvania *CareerLink*** name. The charter is a license for the ***CareerLink*** operator to conduct business at a specific site under the ***CareerLink*** brand name and to utilize the ***CareerLink*** operating system.

Team Pennsylvania *CareerLink* is the brand name for Pennsylvania's one stop delivery system. Similar to a franchise, the ***CareerLink*** brand name is backed by **Team Pennsylvania *CareerLink*'s** state-of-the-art operating system, technical training services, marketing programs, and labor market information. As with any franchise, the integrity of the brand name is the key to the success of the organization. Once a site is officially established the State WIB and Local WIBs share responsibility for protection of that brand, to ensure its ongoing connection to reliably high quality services. Quality assurance and oversight of the ***CareerLink*** system also becomes a shared responsibility of the State WIB and Local Workforce Investment Boards. This partnership is crucial to ensuring the delivery of high quality services to customers.

The key tool in that protection is the chartering process that has been adopted by the Commonwealth. Chartering is the approval process done by a Local WIB to determine whether a site can operate using the **Team Pennsylvania *CareerLink*** brand name. The standards for that determination are a blend of state requirements with additional local requirements.

PART THREE

ROLE OF STATE WORKFORCE INVESTMENT BOARD

Prior to the passage of the Workforce Investment Act, the Commonwealth initiated a collaborative process to build a regionally planned, locally directed market driven workforce and economic development system. As the Governor's advising body on Workforce Development issues and solutions, the **Team Pennsylvania** Workforce Investment Board (State WIB) has been charged with the responsibility to coordinate all workforce development programs including the one stop employment and training delivery system that is to be customer focused and inclusive of *all* citizens of the Commonwealth.

To support the State WIB's efforts regarding center quality, the ***CareerLink*** Bureau has been designated as the entity responsible for system building efforts and is charged with overseeing the implementation and operation of the ***CareerLink*** delivery system and maintaining the integrity of the ***CareerLink*** brand name.

The State Workforce Investment Board, as the corporate holder of the ***CareerLink*** brand name, is responsible for establishing the minimum standards for operation under this name. Pennsylvania's chartering criteria, framed by the Malcolm Baldrige quality criteria, establishes:

- A systemic vision for high quality service;
- Brand name standards or minimum requirements for operation;
- Concrete expectations for operational readiness standards;
- Continuous improvement process by increasing performance expectations for outcomes and customer satisfaction.

ROLE OF THE LOCAL WORKFORCE INVESTMENT BOARD

The Local WIB is the catalyst for coordinating and aligning workforce services and investment strategies that reflect the particular needs of Pennsylvania's local and regional economies. Local WIBs have the responsibility to take the State WIB minimum chartering criteria and establish their local chartering process.

All ***CareerLink*** Centers must meet those minimum statewide standards, as well as any additional ones established by the Local WIB. The Local WIB is responsible for substantiating that, at a minimum, the State WIB's chartering criteria have been met prior to issuing a charter.

Pennsylvania's Local WIBs play a critical leadership role by controlling the issuance of ***CareerLink*** Charters consistent with the State WIB's standards. Based on customer demand, need, accessibility and community resources, the Local WIB can add additional criteria to their chartering process. It is also a Local WIB decision whether to charter multiple ***CareerLink*** sites and also their responsibility to provide on going oversight and monitoring of the ***CareerLink*** centers in their Workforce Investment Area.

A separate committee of the Local WIB should be formed to handle chartering and related responsibilities. To avoid a conflict of interest this committee should be comprise of board members who are not ***CareerLink*** partners.

ROLE OF THE CAREERLINK BUREAU

The ***CareerLink*** Bureau has been designated as the entity responsible for system building efforts, oversight of the implementation and operation of the ***CareerLink*** system and safeguarding/maintaining the integrity of the ***CareerLink*** brand name. In conjunction with the State WIB the ***CareerLink*** Bureau monitors and evaluates the ***CareerLink*** system and provides technical assistance to Local WIBs, ***CareerLink*** Operators and Managers.

The ***CareerLink*** Bureau will also be responsible for 'corporate' wide ***CareerLink*** issues including policy, operating system support, training and marketing efforts. Monitoring and evaluation also includes evaluating customer satisfaction and overall performance of the system.

PART FOUR

CHARTERING POLICY

As a statewide system, ***CareerLink*** covers metropolitan areas as well as rural areas. Therefore, different types of centers are required in order to meet our customers' needs, insure statewide coverage, and provide easy accessibility to all Commonwealth residents. Pennsylvania's model is similar to the banking industry, with full service banks complemented by branch offices offering limited services and ATM machines offering basic core banking functions.

Comprehensive ***CareerLink*** centers are the flagship of the State WIB and Local WIB's service delivery system. The flagship sites are complemented by Mini Centers which provide limited service, and access points offering customers connections to basic ***CareerLink*** services.

The minimum chartering criteria approved by the State Workforce Investment Board will be used to charter comprehensive centers, as well as Mini Centers. Consistent with the State Plan, each ***CareerLink*** center will be chartered by the Local Workforce Investment Board. Although the minimum requirements must be met for chartering, the process is ongoing and progressive with performance being periodically monitored.

At its discretion, the Local Workforce Investment Board may set chartering requirements and /or standards for comprehensive and non-comprehensive sites that exceed the minimum criteria established by the State Workforce Investment Board.

As stipulated by federal law, all federal ADA compliance requirements must be met before a center is eligible to receive the ***CareerLink*** Charter or utilize the ***CareerLink*** name or official Access Point signage.

In order for a ***CareerLink*** Center to be considered for a charter, the ***CareerLink*** operator with the mandated and optional partners will be required to jointly prepare a modified ***CareerLink*** Site Business Plan. The Business Plan will identify the available products and services, the organizational structure, an operational and financial plan including cost allocations, the marketing strategies and other related information necessary to operate a ***CareerLink*** center. The review and approval of that plan by the Local WIB will ensure the avoidance of duplication of services and the inclusion of all mandated partners.

Before a site can receive a charter the Local WIB must ensure that the site is operational and the following items approved by the Local WIB, ***CareerLink*** Bureau and State WIB:

- Approved Governance Agreements (MOU and Cost Allocation Plan)
- Approved ADA compliance plan
- Fully functional Resource Area with installation of PC's connected to the Internet and staff trained on the ***CareerLink*** operating system.

Local WIBs should notify the State WIB and the ***CareerLink*** Bureau when a charter is issued, renewed or revoke. Marketing activity utilizing the ***CareerLink*** name is not permitted until the Local WIB issues a charter or if a charter has been revoked.

Comprehensive Sites

One of the key responsibilities of ***CareerLink*** as the one-stop delivery system is to ensure that the WIA core services are available in a minimum of at least one comprehensive site located in each designated local workforce investment area.

Comprehensive sites are expected to provide all of the core services outlined in the Workforce Investment Act, including:

- Outreach, intake, and orientation;
- Initial assessment of skill levels, aptitudes, abilities and supportive service needs;
- Job search and placement assistance;
- Career counseling;
- Provision of labor market information;
- Provision of information about education and training providers; and
- Financial aid advising.

See pages 24 and 25 for a complete listing of ***CareerLink*** services.

CareerLink comprehensive sites are the physical locations where at a minimum all the core services of the following programs are available:

- WIA Title I Programs
  - Adults
  - Dislocated
  - Youth
  - Job Corp
  - Native American programs
  - Migrant & Seasonal Farm workers Programs
- Wagner Peyser (Employment Service)
- Unemployment Compensation
- WIA Title II--Adult Education & Literacy
- Social Security Programs (Welfare to Work)
- Title V Older Workers
- Carl Perkins
- Trade Act
- Veterans Employment
- Community Service Block Grants
- Rehabilitation Act of 1973 (OVR)
- HUD

At least three organizations funded by one or more of these sources must be physically co-located within a comprehensive site. Services are provided in an integrated, seamless delivery method under the name of **Team Pennsylvania *CareerLink***. Staff from the various funding streams is available and cross-trained to deliver services in an integrated and seamless manner. The ***CareerLink*** web-based operating system is the system of record for these services. To facilitate integration, partners will share facilities, resources, technology platforms, job development teams, case management, job database, support services, application protocol and forms, assessment, employer services, marketing plans, performance and evaluation measures.

Mini Centers

A ***CareerLink*** Mini Center is a physical location where two or more ***CareerLink*** partners are delivering services, providing access to the web-based ***CareerLink*** system, and providing staff assistance to customers. The following represent minimum requirements for the establishment of a ***CareerLink*** Mini Center. Local Workforce Investment Boards may add to these minimum requirements based on their area's needs.

A Mini Center must:

- Be linked to a comprehensive/full service center, as coordinated by the ***CareerLink*** Operator selected by the Local Workforce Investment Board.
- Be chartered independently from the comprehensive center within the framework of the Local WIB process. A Mini Center must meet all the Level I chartering criteria before they can operate under the **Team Pennsylvania *CareerLink***.
- Have a minimum of two ***CareerLink*** partner agencies one of which must be a WIA mandated partner.
- Maintain customer universal access
- Have trained staff available to provide ***Career Link*** staff assisted core services, which may be over and above the partners' services.
- Be part of the Combined Business Plan for the comprehensive site. This modification can be submitted via an addendum through the ***CareerLink*** Operator to the Local WIB for approval and consideration for chartering. (Note: There is not a separate operator for a Mini Center, however a Mini Center may have a separate site manager. The ***CareerLink*** Operator selects the site manager.)
- Use the ***CareerLink*** Operating System and have signed the appropriate data sharing agreements.
- Have hours of operation that are based on customer needs and are customer driven.
- Be staffed and provide universal access to core services with a referral process to the comprehensive center or other provider locations for services not delivered on site.
- Include a fully operational Resource Center.

The same minimum chartering criteria approved by the State Workforce Investment Board for the chartering of comprehensive centers must also be used to charter a ***CareerLink*** Mini Center. Each ***CareerLink*** Mini Center will be chartered, consistent with the State criteria, by the Local Workforce Investment Board. As with comprehensive centers, in order to display the **Team Pennsylvania *CareerLink*** name and logo, Mini Centers must utilize the State WIB chartering criteria.

Again, as required of comprehensive centers, a ***CareerLink*** Mini Center will not be eligible to receive a charter or official Access Point signage until all federal ADA compliance requirements are met.

Access Points

Recognizing the impact of the Internet, ***CareerLink*** services are available to anyone with access to a personal computer. The virtual component of the ***CareerLink*** operating system, however, also positions other organizations such as schools and libraries with an opportunity to expand their delivery of services and resources by becoming a ***CareerLink*** Access Point. An official ***CareerLink*** Access Point must be able to report results, may offer more than the minimum technical services required in order to meet the universal access requirements of WIA, and

provide basic core services. Access Points must be tied to a comprehensive site and be under the administration and responsibility of the ***CareerLink*** operator.

It is the role of the Local Workforce Investment Board to determine a site's eligibility to be designated and issued signage as an "Official ***CareerLink*** Access Point" by meeting the minimal requirements designated by the State WIB.

Access Points cannot display signage typically available at comprehensive sites or Mini Centers, but must agree to display signage specified by **Team Pennsylvania** ***CareerLink*** indicating it is a ***CareerLink*** Access Point. Additionally, upon agreement with the comprehensive ***CareerLink*** Operator. Access Points must make available brochures and signage indicating what customer services are available at the Access Point.

To be an official CareerLink access point, a location must:

- At a minimum, adhere to ***CareerLink*** technical standards by having hardware, software, Internet access and technical expertise needed for operation of the ***CareerLink*** system.
- Provide a level of measurement, which is submitted by the Operator as a modification to the business plan.
- Provide staff assistance to its customers in using the computer; staff must be knowledgeable and trained by the operator.
- Promote ***CareerLink*** to its customers by making available ***CareerLink*** brochures, newsletters, directories and other information useful to customers
- Agree to make a referral to a comprehensive site or Mini Center for additional services.

Due to the level of services being provided at a ***CareerLink*** access point, it is not anticipated that staff access will be needed to provide services. However, staff access shall be reviewed and approved on a case-by-case basis at the request of the operator and approval of ***CareerLink*** Bureau.

TEAM PENNSYLVANIA WORKFORCE INVESTMENT BOARD

MINIMUM CHARTERING CRITERIA AND MEASURES

FOR TEAM PENNSYLVANIA *CAREERLINK* SITES

Criteria	Measures		
	Level I	***Level II***	***Level III***
I. LEADERSHIP			
1) CLEAR SENSE OF MISSION	1) Written mission statement displayed and endorsed by partners	1) Employees know and understand mission	1) Community understands the mission
2) AGENCY LEADERSHIP	2) Signed partnership agreement	2) Increased level of commitment by agency partners and/or increased number of partners	2) Partners reflect the workforce development community
3) COMMUNITY LEADER COMMITMENT	3) Advisory body of key community leaders	3) Tangible evidence of community leader commitment	3) Extraordinary evidence of community leader commitment (e.g., diversification of funds)
4) IDENTIFIABLE MANAGEMENT STRUCTURE	4) Defined management structure, organizational chart available	4) Evidence of functional integration (e.g., joint venture relationship)	4) Leadership support of extensive functional integration is evident
II. INFORMATION AND ANALYSIS			
1) FUNCTIONAL RESOURCE CENTER	1) Resource Center offers: information in multiple mediums; self-service; Internet access; and trained staff	1) Resource Center has comprehensive current local information	1) Service offerings are linked to continuous improvement efforts
2) MANAGEMENT INFORMATION SYSTEM (MIS)	2) Strategy for meeting state and local MIS needs (management and reporting needs)	2) MIS feeds state and local systems and is capable of producing customized reports for the local workforce development community	2) Information is used for decision making

TEAM PENNSYLVANIA WORKFORCE INVESTMENT BOARD

MINIMUM CHARTERING CRITERIA AND MEASURES

FOR TEAM PENNSYLVANIA *CAREERLINK* SITES

III. STRATEGIC PLANNING			
1) STRATEGIC PLAN	1) Business plan has been developed	1) Three-year strategic plan has been developed	1) Decisions are made based on strategic plan
IV. HUMAN RESOURCE UTILIZATION			
1) STAFF COMPETENCIES	1) Assessment of competencies needed; demonstration of commitment to training (i.e., dedicated training time and budget)	1) Funded employee career development plans	1) Significant on-going investment in staff training
2) EMPLOYEE FRIENDLY ENVIRONMENT	2) Effective labor relations structure	2) Process for measuring employee satisfaction	2) Employee feedback used for continuous improvement
3) TEAM BUILDING	3) Cross-training of staff	3) Cross functional work teams	3) Staff empowerment (e.g., decision making is de-layered, staff authorized to make decisions)
4) REWARDS AND RECOGNITION	4) Plan for employee rewards and recognition	4) Evidence that employee rewards and recognition are granted	4) Rewards and recognition are tied to external quality systems
V. PROCESS MANAGEMENT			
1) POLICIES AND PROCEDURES	1) Evidence of staff involvement in developing policies and procedures	1) Integrated policies and procedures; established process for changing policies and procedures	1) Process to make changes is functional (e.g., policies and procedures have been changed)
2) ACCESSIBLE SERVICES AND RESOURCES BASED ON CUSTOMER CHOICE	2) Basic customer flow is documented; ADA compliance; available parking and public transportation; effective signage; safe environment	2) Feedback mechanism to improve customer flow and access	2) Feedback mechanism is generating change
3) SERVICE INTEGRATION	3) Core service look and feel integrated	3) Evidence of service integration	3) Evidence of extensive integration
4) SERVICE RECOVERY	4) Strategy for recovery process	4) Staff has authority and tools to address issues/problems	4) Recovery is part of routine business

TEAM PENNSYLVANIA WORKFORCE INVESTMENT BOARD

MINIMUM CHARTERING CRITERIA AND MEASURES

FOR TEAM PENNSYLVANIA *CAREERLINK* SITES

VI. BUSINESS RESULTS			
1) CUSTOMER OUTCOMES	1) Customer outcomes baseline established based on center performance measures • Ratio of referrals to hires • Entered employment • Retention	1) Improvement in customer outcomes	1) Maximize and sustain customer outcomes
2) SUSTAINABILITY	2) Process for considering cost and revenue	2) Financial strategy for Center sustainability exists	2) Implementation of financial strategy
3) MARKET PRESENCE	3) Market presence baseline established	3) Market niche identification	3) Community-wide recognition of Center as a valuable resource
4) CUSTOMER SATISFACTION	4) Customer satisfaction baseline (tied to markets) established	4) Improvement in customer satisfaction	4) Maximize and compare to best in class enterprises
VII. CUSTOMER SATISFACTION			
1) INTERNAL AND EXTERNAL CUSTOMER SATISFACTION MEASUREMENT	1) Satisfaction information is collected from internal and external customers	1) Customer satisfaction information is used to continuously improve	1) Customer satisfaction information drives change
2) WIDELY AND FREELY SHARED CUSTOMER SATISFACTION RESULTS	2) Process for sharing customer satisfaction results internally and externally	2) Customer satisfaction results are shared in multiple mediums	2) Customer satisfaction information is analyzed over time
3) CUSTOMER SATISFACTION WITH VENDORS/SUPPLIERS	3) Information on satisfaction with vendors/suppliers is collected to support customer (employer and individual) choice	3) Information on satisfaction with vendors/suppliers is used to improve referrals to and performance of vendors/suppliers	3) Demonstrated improvement in customer satisfaction with vendors/suppliers

PART FIVE

CHARTERING PROCESS & SITE CHECKLIST

The chartering of a site to bear the **Team Pennsylvania *CareerLink*** name involves through and vigorous work. Prior to issuing a charter, the Local WIB is the agent charged with substantiating that, at a minimum, the State WIB chartering criteria has been met. Part of the chartering process will involve site visits by the Local WIB. After a site has become operational it is issued a charter. This will be the direct result of the steps the Local WIB takes in conjunction with the ***CareerLink*** Operator to make certain that in each case a site uniformly meets established administrative, physical, and operational baselines/ standards/requirements .

An example of the steps that may be taken prior to issuing a charter are as follows:

Step One Local WIB establishes a vision for the local ***CareerLink*** system

Step Two Local WIB establishes local chartering process and criteria incorporating minimum State WIB criteria. The Local WIB selects the ***CareerLink*** Operator and or the site.

Step Three ***CareerLink*** Operator opens ***CareerLink*** site

Step Four Local WIB reviews the business plan and conducts site visit

Step Five Local WIB issues charter or letter to Operator on deficiencies

To aid with determining whether a site has met all the requirements to bear the ***CareerLink*** brand name the Chartering Site Checklist on the next page will be a valuable tool when conducting a site visit.

CHARTERING SITE CHECKLIST

- Entry point -Does the site feel welcoming and non-governmental? Is a menu of services displayed? Is the ***CareerLink*** mission and vision displayed?

- Entry point - Is a greeter/receptionist present? Are they knowledgeable of ***CareerLink*** system, partners and services available at center? Is the greeter/receptionist customer-friendly and provide immediate assistance?

- Services available - Are mandated partners on site? If not are their services available through the ***CareerLink***? How? Are additional services and organizations involved which are representative of the community?

- Organizational structure - Has the ***CareerLink*** (one-stop) Operator been selected? If a consortium does it appear that the organizations are operating as a single entity? Is there a signed partnership agreement? Is the management structure defined? Has a site manager been named? Is the site manager system focused or funding stream focused? Is an organization chart available for the site?

- Career Resource Area - Is this the focal point of the ***CareerLink*** site? Are adequate PC's available? Is information provided in alternate formats? Is printed material available? Are the signs appropriate to assist customers? Is the resource area adequately staffed? Is the staff knowledgeable of the services available? Is the area customer friendly and non-governmental? Is the area well lit?

- Customer flow - Do core, intensive and training services flow seamlessly and are they understood by staff? Do services feel integrated? How does the customer move through the system? Is the flow explained by service instead of funding stream? What is the referral system between programs?

- Physical layout - Seamless appearance? Professional and business like? Are partners organized in teams or by services rather than by their agency name? Are agencies operating under ***CareerLink*** name or by their employing organizations name? Are the hours of operation listed? Is the site easily accessible with convenient parking and public transportation? Is the site in compliance with ADA?

- Staff competencies and knowledge - Has an assessment of staff competencies been completed? Has the staff been trained on the operating system? Has cross information training conducted? Is staff knowledgeable of the management structure? Do they understand the ***CareerLink*** vision and mission? Has the staff been involved in developing procedures? Is there an effective labor relations

structure in place? ***CareerLink*** Signs- easily identifiable, appropriate signage outside building, door signs? Does the staff wear ***CareerLink*** nametags? Use ***CareerLink*** business cards and stationary?

- Financial plan - In place, sustainability issues addressed, plans for future sustainability being addressed.

- Customer Satisfaction - Is the center utilizing customer satisfaction tools? Is satisfaction information collected from internal and external customers? How is customer satisfaction shared? How is satisfaction with vendors collected to support customer choice? Does the site have a strategy for service recovery?

- Business Plan - Does the center have a business plan? Are the Operator, site manager and staff knowledgeable about the business plan? Does it include a marketing and service delivery strategy? Has a marketing presence baseline been established? Has a customer satisfaction baseline been established? Are outcome measurements established? How are they collected and reporting? Is there a plan for employee rewards and recognition? Is there a strategy for management and reporting needs? Does the site have an advisory body of key community leaders?

PART SIX

QUALITY ASSURANCE PROCESS

Monitoring and continuous improvement assessment is a consistent theme throughout the Workforce Investment Act. These responsibilities reside at several different levels within the overall workforce investment framework. Within the Commonwealth of Pennsylvania, the Malcolm Baldrige criteria serve as the platform from which monitoring and continuous improvement assessment functions will be built. Adhering to the basic chartering criteria established by the State WIB is a core element of the monitoring and evaluation process.

Monitoring and continuous improvement assessment occurs at both the State and local levels. The State WIB will work in conjunction with the ***CareerLink*** Bureau to carry out these responsibilities at the State level.

Chartering responsibilities reside with the Local WIBs. Those boards are the bodies that must approve all new charters and re-charter any existing centers. The Local WIBs may use criteria for chartering in addition to the basic chartering criteria established by the State WIB but the boards must insure that the basic criteria are part of their processes.

All ***CareerLink*** sites operate similar to franchises of major private sector businesses. In order to display the ***CareerLink*** name and use the ***CareerLink*** operating system, the centers must meet minimum standards established by the State WIB and assessed jointly by the State WIB and the ***CareerLink*** Bureau. Therefore these two state entities will jointly conduct assessments of local centers to determine if the minimum criteria are being met.

However, since chartering the centers is ultimately a Local WIB responsibility, feedback and any corrective action necessitated by the joint reviews will be channeled back to the Local WIBs for response. The State WIB retains the right to revoke use of the ***CareerLink*** brand name and to revoke access to the operating system if minimum standards are not met at any particular center. Since the Local WIBs are the chartering bodies, applying any sanctions will be carried out through the local boards. The State WIB and ***CareerLink*** Bureau will work cooperatively with Local WIBs, if problems are identified, to seek remedial action. In the unlikely event that compliance is not reached, the Local WIB may be directed by the State WIB and the ***CareerLink*** Bureau, acting jointly, to remove the ***CareerLink*** name and restrict access to the operating system.

Local WIBs are required to have at least one full service ***CareerLink*** site within their region. If that requirement is not met due to non-compliance with the minimum State WIB chartering criteria, as assessed jointly by the State WIB and the ***CareerLink*** Bureau, the State WIB is responsible for initiating action against the Local WIB. Such action may include technical assistance but could ultimately result in reorganization of the Local WIB or re-designation of the local area, as provided under the Act.

criteria that may augment the minimum State WIB chartering standards. In order to ensure consistency and to facilitate cooperation, Local WIBs, the State WIB and the ***CareerLink*** Bureau should work collaboratively to schedule reviews, compare findings, and impose corrective action, if necessary.

At a minimum, the State WIB Level I chartering criteria must be used as the benchmarks against which centers are monitored and assessed.

TOOL FOR MONITORING CHARTERING QUALITY ASSURANCE

The State WIB in conjunction with the ***CareerLink*** Bureau will monitor and evaluate chartered ***CareerLink*** centers to ensure adherence to the minimum standards. The evaluation of a center will include meeting with the Local WIB and the ***CareerLink*** Operator as well as visiting the ***CareerLink*** center. The State WIB and the ***CareerLink*** Bureau will utilized the following tool to monitoring and evaluation chartered ***CareerLink*** sites:

1. **Leadership:**

- *Clear Sense of Mission* – Is the written mission statement displayed and endorsed by the partners? Is the mission and vision displayed at the entry point of the center? Does staff know and understand the ***CareerLink*** vision and mission?

- *Agency Leadership* – Has the ***CareerLink*** (one-stop) Operator been selected? If the operator is a consortium, does it appear that the organization is operating as a single entity? Is the consortium agreement signed? Is the WIB-operator agreement signed and in place?

- *Community Leader Commitment* – Is there an advisory body of key community leaders? Are additional services and organizations involved which are represented in the community?

- *Identifiable Management Structure* - Is there a defined management structure and organizational chart available? Has a site manager been named? Is the site manager system focused or funding stream focused? Is staff knowledgeable of the management structure?

2. **Information and Analysis:**

- *Functional Resource Center* – Is the resource center the focal point of the center? Are adequate PC's available to meet customer needs? Is information provided in alternative formats? Is printed material available? Are the PC's connected to the Internet and the ***CareerLink*** operating system? Is the resource area designed to allow self-service by customers? Is the resource area adequately staffed? Is the area customer friendly and non-governmental?

- *Management Information Systems (MIS)* – Is there a strategy for meeting state and local MIS needs for management and reporting? Is there a strategy for management and reporting needs?

3. **Strategic Planning:**

- *Strategic Plan* – Has the Modified Combined Business Plan been developed? Is the ***CareerLink*** operator, manager and staff knowledgeable about the business plan? Does the business plan include a marketing and service delivery strategy?

4. **Human Resources Development and Management**

- *Staff Competencies* – Has an assessment of staff competencies been completed? Has all staff been trained on the operating system? Is there a demonstration of commitment to training

through time and budget? Has cross-informational training been conducted with all staff? Is the greeter/receptionist knowledgeable of the ***CareerLink*** system, partners, and services available at the center? Is the staff in the resource area knowledgeable of the services available and how to use the ***CareerLink*** operating system?

- *Employee Friendly Environment* – Is there an effective labor relation's structure?

- *Team Building* – Is there cross training of staff? Are partners organized in teams or by services rather than by their agency name? Are agencies operating under the ***CareerLink*** name or by their employing organization's name? Does the staff wear ***CareerLink*** nametags? Does the staff use ***CareerLink*** business cards and stationary?

- *Rewards and Recognition* – Is there a plan for employee rewards and recognition?

5. **Process Management:**

- *Policies and Procedures* – Is there evidence of staff involvement in developing policies and procedures? Is a greeter/receptionist present? Is the greeter receptionist customer-friendly and provide immediate assistance? Are the hours of operation listed?

- *Accessible Services and Resources Based on Customer Choice* – Is the basic customer flow being documented? Does the site feel welcoming and non-governmental? Is a menu of services displayed? Have ADA compliance issues been met? Is there available parking and public transportation? Is there effective signage?

- *Service Integration* – Are required partners on site? If not are their services available through the ***CareerLink***? How? Are additional services and organizations involved which are representative of the community? Do core, intensive and training services flow seamlessly and does staff understand them? How does the customer flow through the system? Is the flow explained by service instead of funding stream? What is the referral system between programs? Is it customer focused? Do core services look and feel integrated?

- *Service Recovery* – Has a strategy for recovery process been developed and implemented?

6. **Business Results:**

- *Customer Outcomes* – Are baseline customer outcomes established based on center performance measures: ratio of referrals to hire, entered employment, and retention? How are they being collected?

- *Sustainability* – Is there a process for considering cost and revenue? Has the center established a cost allocation plan? Is a cost allocation agreement (budget) for the center in place? Are sustainability issues being addressed?

- *Market Presence* – Has a market presence baseline been established?

- *Customer Satisfaction* – Has a customer satisfaction baseline been established? Are customer satisfaction baselines tied to markets established?

7. **Customer Focus and Satisfaction:**

- *Internal and External Customer Satisfaction Measurement* – Is satisfaction information collected from internal and external customers? Is the center utilizing customer satisfaction tools?

- *Widely and Freely Shared Customer Satisfaction Results* – Has a process for sharing customer satisfaction results internally and externally been developed and implemented? How is customer satisfaction information shared?

- *Customer Satisfaction with Vendors/Suppliers* – Has information on satisfaction with vendors/suppliers been collected to support customer (employer and individual) choice?

PART SEVEN

REFERENCES

DEFINITIONS

CareerLink system: A ***CareerLink*** service delivery strategy which includes local ***CareerLink*** sites (comprehensive, mini and access points) as well as a virtual ***CareerLink*** website where customers can choose how to access information and services.

Virtual CareerLink site: An integrated web-based operating system that is the system of record for all ***CareerLink*** services. All job seekers and all job listings are entered into a shared system.

Local CareerLink System: A local ***CareerLink*** service delivery strategy, which includes one or more specific site(s), management infrastructure, and systems for capacity building and integration of staff and services.

Comprehensive CareerLink center: A physical location where all ***CareerLink*** mandated partners' services are accessible.

CareerLink Mini Center: A physical location where two or more ***CareerLink*** partner(s) are providing services for their programs and also providing access to the web-based ***CareerLink*** system and staff assistance to customers.

CareerLink AccessPpoint: A physical location where customers can access the web-based ***CareerLink*** system. Staff assistance may or may not be available.

CareerLink Operator: A ***CareerLink*** Operator may be a single (public or private) entity or a consortium of entities with demonstrated effectiveness in employment and training. Entities eligible to be named a ***CareerLink*** Operator may include: a post secondary educational institution, an employment service agency established under the Wagner-Peyser Act, a private non profit organization (including community based organizations), a private for profit entity, a government agency, a nontraditional public secondary school, area vocational education school, or any other organization interested in workforce and economic development, which may include a local chamber of commerce or other business concern. Elementary and secondary schools are not eligible for selection as ***CareerLink*** Operators.

Site Manager: Each ***CareerLink*** center will have a site manager, selected by the ***CareerLink*** Operator, whose responsibilities include the coordination of activities and services on a daily basis. Site managers are responsible for creating a professional and inviting atmosphere that will encourage customers to avail themselves of the services. Within their business plan all sites will be required to develop a process to resolve issues/grievances by partners and/or potential partners

Core Services: Core services are provided by all ***CareerLink*** partners and universally accessible to all customers. There are no eligibility requirements for core services.

Intensive Services: Intensive services are designed for the unemployed who are unable to obtain employment through core services. Eligibility is based on need to obtain or retain employment, which allows for self-sufficiency.

Training Services: Will be made available through the ***CareerLink*** system to adults and dislocated workers who have met the eligibility requirements for intensive services, received at least one intensive service through the ***CareerLink*** system and who are still unable to obtain or retain employment. Training services will be provided in a manner that maximizes consumer choice in the selection of an eligible provider or training services from the state list of eligible providers of training services.

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SERVICES--JOB SEEKERS

JOB SEEKERS – CORE SERVICES

- OUTREACH, INTAKE (WHICH MAY INCLUDE WORKER PROFILING AND REEMPLOYMENT SERVICES), AND ORIENTATION TO THE ***CAREERLINK*** SYSTEM.
- INITIAL ASSESSMENT.
- DETERMINATION OF ELIGIBILITY FOR SERVICES FOR ALL PARTNER EMPLOYMENT AND TRAINING PROGRAMS.
- JOB SEARCH ASSISTANCE (I.E. WORKSHOPS), CAREER INFORMATION, AND COUNSELING.
- JOB MATCHING AND REFERRAL
- LOCAL, REGIONAL AND STATEWIDE LABOR MARKET INFORMATION.
- INFORMATION ON FINANCIAL AID, INCLUDING UNEMPLOYMENT COMPENSATION.
- INFORMATION ON:
- CERTIFIED EDUCATION AND TRAINING PROVIDERS,
- LOCAL PERFORMANCE OUTCOMES OF SERVICE PROVIDERS,
- ***CAREERLINK*** ACTIVITIES, SUCH AS JOB FAIRS, AND
- SUPPORTIVE SERVICES.
- ORIENTATION TO PERSONAL COMPUTERS FOR ACCESS TO SELF-DIRECTED SERVICES, SUCH AS INTERNET ACCESS AND RESUME SOFTWARE.
- COORDINATION OF INFORMATION AND SERVICES WITH SCHOOL-TO-CAREERS ACTIVITIES
- FOLLOW-UP ACTIVITIES, INCLUDING REASSESSMENT SERVICES, WHERE NEEDED.

JOB SEEKERS – INTENSIVE SERVICES

- COMPREHENSIVE ASSESSMENT OF KNOWLEDGE, SKILLS, ABILITIES AND INTERESTS BY USE OF VARIOUS ASSESSMENT TOOLS, SUCH AS TESTING.
- DEVELOPMENT OF AN INDIVIDUAL EMPLOYMENT PLAN.
- GROUP COUNSELING.
- INDIVIDUAL CAREER PLANNING.
- CASE MANAGEMENT.
- SHORT-TERM PRE-VOCATIONAL AND STAND-ALONE SERVICES, SUCH AS ADULT BASIC EDUCATION, ENGLISH AS A SECOND LANGUAGE, GED, BASIC COMPUTER LITERACY, INTERVIEWING SKILLS, AND SOFT SKILLS.

JOB SEEKERS – TRAINING SERVICES

- OCCUPATIONAL SKILLS TRAINING, INCLUDING TRAINING FOR NONTRADITIONAL EMPLOYMENT WILL BE PROVIDED THROUGH ITA(S) FOR ADULTS AND DISLOCATED WORKERS.
- ON-THE-JOB TRAINING.
- PROGRAMS THAT COMBINE WORKPLACE TRAINING WITH RELATED INSTRUCTIONS, WHICH INCLUDE COOPERATIVE EDUCATION PROGRAMS.
- PRIVATE SECTOR TRAINING PROGRAMS.
- SKILL UPGRADING AND RETRAINING.
- ENTREPRENEURIAL TRAINING.
- JOB READINESS TRAINING.
- ADULT EDUCATION AND LITERACY ACTIVITIES, WHERE THEY ARE INTEGRATED WITH OTHER TRAINING SERVICES.
- CUSTOMIZED TRAINING CONDUCTED WITH THE COMMITMENT TO EMPLOY THE INDIVIDUALS UPON SUCCESSFUL COMPLETION OF THE TRAINING.
- REGISTERED APPRENTICESHIP AND TRAINING PROGRAMS.

SERVICES--EMPLOYERS

EMPLOYERS – CORE SERVICES

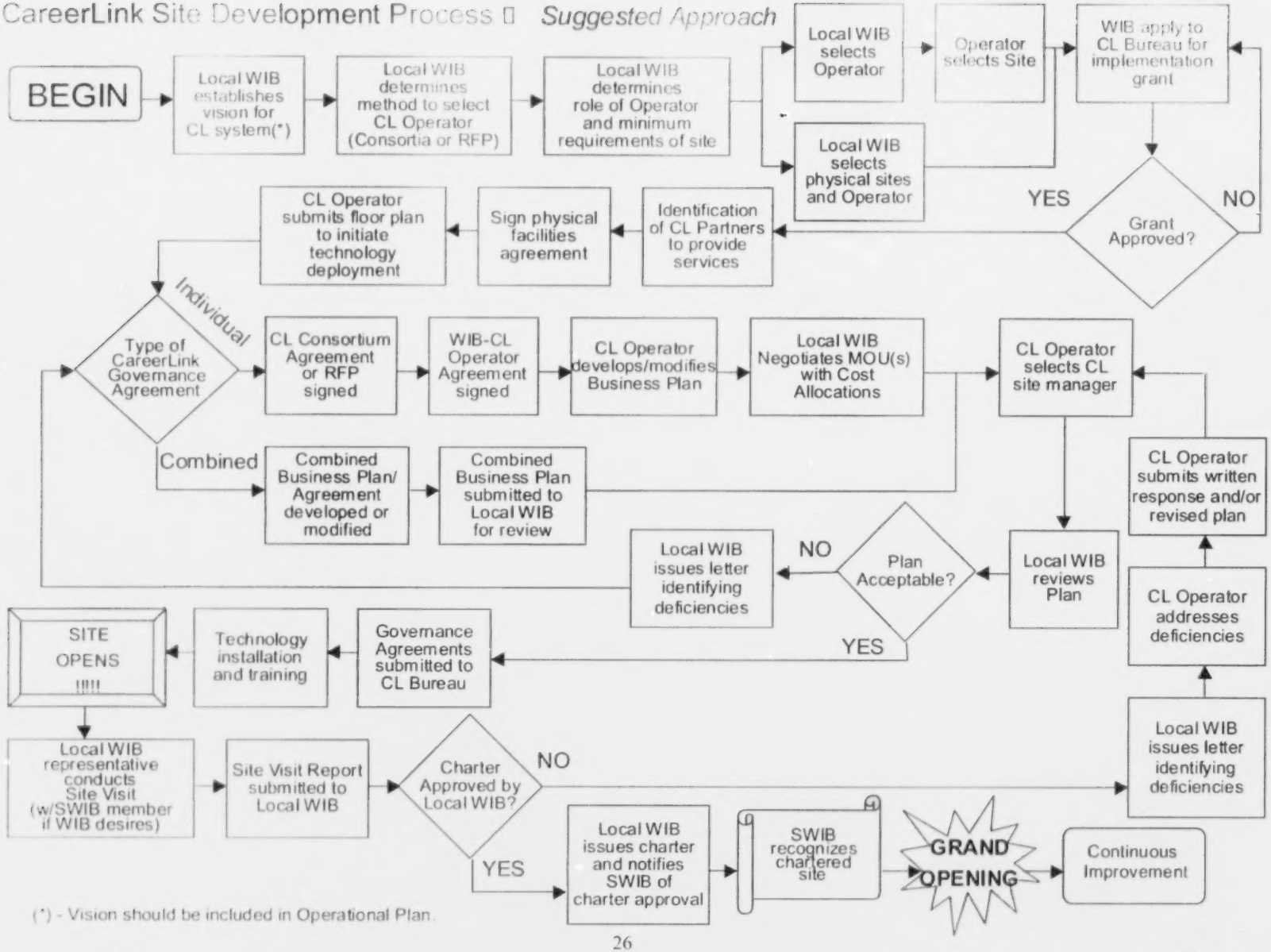
- ORIENTATION TO ***CAREERLINK*** SYSTEM AND SERVICES.
- SELF-ENROLLMENT AND COMMON APPLICATION FOR SERVICES WITH VALIDATION CRITERIA.
- MULTIPLE METHODS TO LIST JOB OPENINGS I.E. TELEPHONE, FAX, INTERNET, WITH EMPLOYER CHOICE REGARDING THE INFORMATION ON THE JOB LISTING AVAILABLE TO THE PUBLIC AND THE METHOD OF REFERRAL.
- ACCESS TO RESUMES LISTED ON ***CAREERLINK***.
- ACCESS TO AMERICA'S CAREER KIT THAT INTEGRATES AMERICA'S JOB BANK SYSTEM, AMERICA'S TALENT BANK, AMERICA'S LEARNING EXCHANGE, AND THE CAREER INFO NET.
- AUTOMATED JOB MATCHING.
- SCREENING AND REFERRAL OF QUALIFIED CANDIDATES.
- TRAINING PROGRAMS, PROVIDERS, AND CONSUMER REPORTS ON EFFECTIVENESS OF SPECIFIC PROVIDERS.
- LABOR MARKET INFORMATION TO BRIDGE ECONOMIC AND WORKFORCE DEVELOPMENT.
- HUMAN RESOURCE INFORMATION; E.G., TAX CREDITS, UC, AND ACCESS TO LABOR LAW AND COMPLIANCE INFORMATION.
- INITIAL SKILLS ASSESSMENT/OCCUPATIONAL PROFILE OF POSITIONS.
- ACCESS TO COMPUTERIZED TRAINING TO UPGRADE INCUMBENT BASIC SKILLS.
- RAPID RESPONSE, INITIAL CONTACTS.

EMPLOYERS – INTENSIVE SERVICES

- ACCOUNT EXECUTIVE SERVICES, INCLUDING BROKERING WITH OTHER SERVICE PROVIDERS/RESOURCES.
- JOB PROFILING.
- RAPID RESPONSE SERVICES, INCLUDING OUTPLACEMENT.
- SEMINARS AND INFORMATIONAL WORKSHOPS
- CUSTOMIZED ASSESSMENT FOR NEW HIRES/EXISTING STAFF.
- LINKAGES WITH OTHER EMPLOYERS THAT HAVE SIMILAR NEEDS.
- INDIVIDUALIZED RECRUITMENT PLANS.
- ACCESS TO FEDERAL PROCUREMENT ASSISTANCE.
- ACCESS TO ENTREPRENEURIAL ASSISTANCE.
- ACCESS TO ECONOMIC DEVELOPMENT PROGRAMS AND SERVICES.
- ASSISTANCE TO FOSTER LABOR-MANAGEMENT COOPERATION.

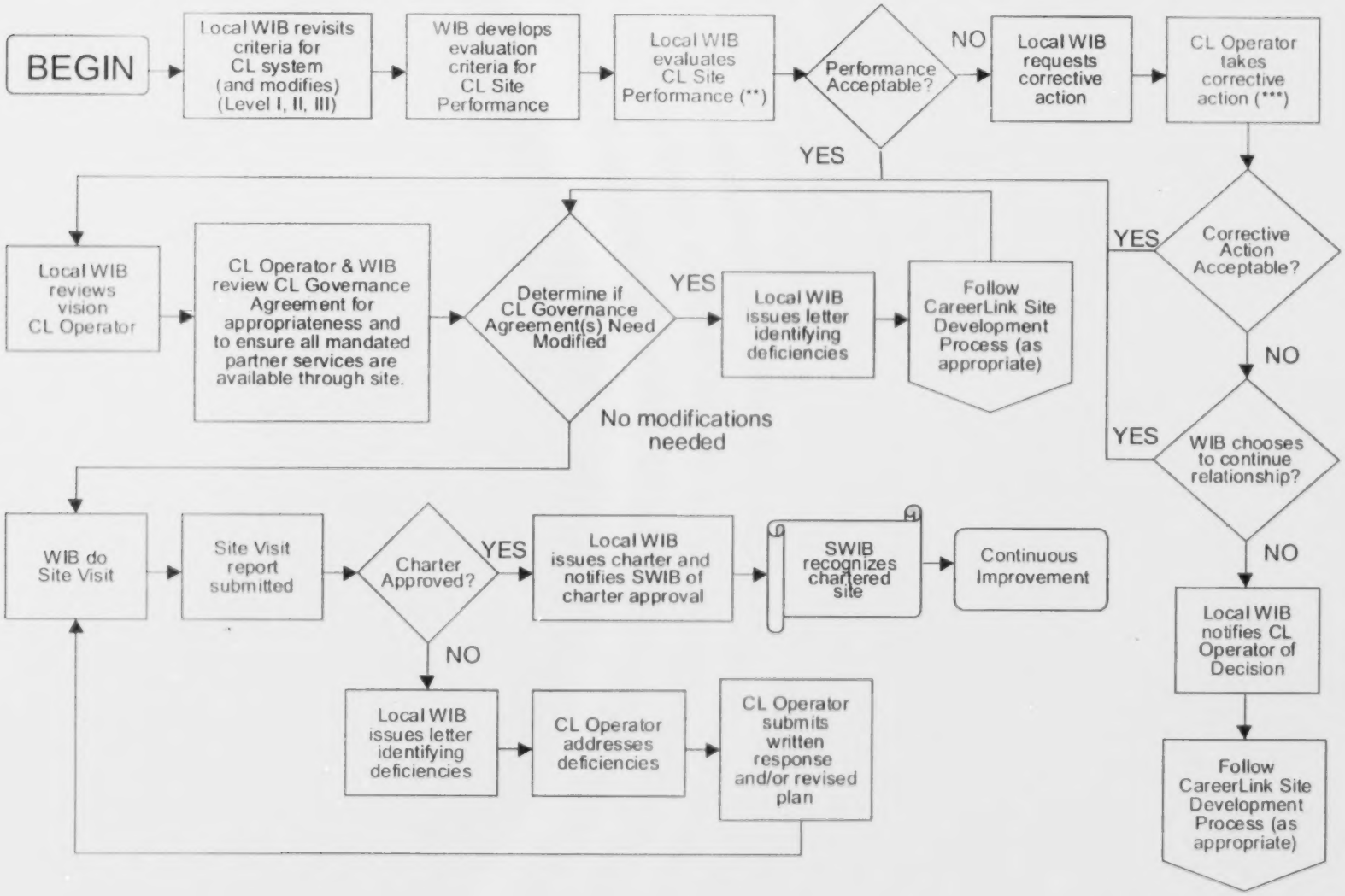
EMPLOYERS – TRAINING SERVICES

- INCUMBENT WORKER TRAINING.
- ON-THE-JOB TRAINING.
- CUSTOMIZED JOB TRAINING FUNDED UNDER WIA.
- ADVANCED SKILLS TRAINING.
- GUARANTEED FREE TRAINING.


CareerLink Site Development Process □ Suggested Approach
BEGIN
Local WIB establishes vision for CL system(*)
Local WIB determines method to select CL Operator (Consortia or RFP)
Local WIB determines role of Operator and minimum requirements of site
Local WIB selects Operator
Local WIB selects physical sites and Operator
Operator selects Site
WIB apply to CL Bureau for implementation grant
Grant Approved?
YES
NO
Identification of CL Partners to provide services
Sign physical facilities agreement
CL Operator submits floor plan to initiate technology deployment
Type of CareerLink Governance Agreement
Individual
Combined
CL Consortium Agreement or RFP signed
WIB-CL Operator Agreement signed
CL Operator develops/modifies Business Plan
Local WIB Negotiates MOU(s) with Cost Allocations
CL Operator selects CL site manager
Combined Business Plan/ Agreement developed or modified
Combined Business Plan submitted to Local WIB for review
Local WIB reviews Plan
Plan Acceptable?
NO
YES
Local WIB issues letter identifying deficiencies
CL Operator submits written response and/or revised plan
CL Operator addresses deficiencies
Governance Agreements submitted to CL Bureau
Technology installation and training
SITE OPENS !!!!!
Local WIB representative conducts Site Visit (w/SWIB member if WIB desires)
Site Visit Report submitted to Local WIB
Charter Approved by Local WIB?
NO
YES
Local WIB issues letter identifying deficiencies
Local WIB issues charter and notifies SWIB of charter approval
SWIB recognizes chartered site
GRAND OPENING
Continuous Improvement
(*) - Vision should be included in Operational Plan.

CareerLink Site Re-chartering Process

(**) - Evaluation done 120 days prior to expiration of Charter.
(***) - CA completed within 60 days of notification


BEGIN
Local WIB revisits criteria for CL system (and modifies) (Level I, II, III)
WIB develops evaluation criteria for CL Site Performance
Local WIB evaluates CL Site Performance (**)
Performance Acceptable?
NO
Local WIB requests corrective action
CL Operator takes corrective action (***)
YES
Corrective Action Acceptable?
YES
NO
WIB chooses to continue relationship?
YES
NO
Local WIB notifies CL Operator of Decision
Follow CareerLink Site Development Process (as appropriate)
Local WIB reviews vision CL Operator
CL Operator & WIB review CL Governance Agreement for appropriateness and to ensure all mandated partner services are available through site.
Determine if CL Governance Agreement(s) Need Modified
YES
Local WIB issues letter identifying deficiencies
Follow CareerLink Site Development Process (as appropriate)
No modifications needed
WIB do Site Visit
Site Visit report submitted
Charter Approved?
YES
Local WIB issues charter and notifies SWIB of charter approval
SWIB recognizes chartered site
Continuous Improvement
NO
Local WIB issues letter identifying deficiencies
CL Operator addresses deficiencies
CL Operator submits written response and/or revised plan

FREQUENTLY ASKED QUESTION REGARDING THE *CAREERLINK* SITE CHARTERING PROCESS

1. Is chartering going to be consistent statewide?

- WIBs will be monitored by the state for compliance with minimum standards for chartering *CareerLink* sites – action can be taken if WIBs are not adhering to minimum standards.
- Beyond adherence to state minimum quality standards for *CareerLink* sites, WIBs are free to charter sites that meet local circumstances, existing relationships, target markets, and participating partners' services.
- Bottom line is that the *CareerLink* logo must stand for quality (above a state-defined minimum) and a consistent set of core services.

2. Franchising

- The charter establishes the standards that must be adhered to if the *CareerLink* name is to be used.
- Failure to live up to the charter agreement can result in revoking of charter – site can no longer use *CareerLink* name until standards are met.
- When a site loses its charter, a WIB may take action to find another operator, either through a new collaboration or through a competitive process. WIB could also close the site completely.

3. How do we involve WIB members in strategic issues (such as *CareerLink* site selection)?

- While many of the *CareerLink* sites (and their Steering Committees) were organized prior to functioning WIBs, the WIBs are now charged with dealing with these strategic issues through the chartering process.
- There is no prescribed sequence of events for how the chartering negotiation takes place – a WIB may set key parameters for the *CareerLink* Operator to respond to, or the WIB may allow the Operator to start with a "blank slate" as it prepares the business plan for the site.
- In all cases, there is no *CareerLink* site without the approval of the WIB and the local elected officials.

4. Who should be on the local chartering committee? What about conflicts of interest? What is ongoing relationship between WIB and *CareerLink* Operator?

- Most WIBs have a specific committee to manage the chartering process.
- Ideally, there should be no members on the chartering committee who have a vested interest in the outcome (such as required service partners) – many of the chartering committees are composed mostly of private sector members.

- Each WIB must also be organized to have an ongoing dialogue with the *CareerLink* Operator. The chartering committee may take on this role, or it may be assigned to another committee.
- Charters are for a specified time period so it will have to be renewed by the WIB.
- Charters may be revoked by the WIB for non-performance of the Operator.
- The "charter" should be viewed as the beginning of the WIB-Operator relationship, not the end.

5. When is chartering required?

- Chartering is required for any comprehensive *CareerLink* site.
- Standards are being developed for "mini-sites" and "affiliates", both of which may display the *CareerLink* name and logo.
- All sites that display the *CareerLink* name and logo will do so only with the quality certification of the local WIB.

6. What is actually required?

- The State WIB and *CareerLink* have a step-by-step process outline for local WIBs – ask for it if you do not have it.
- WIBs must approve the *CareerLink* Operator's business plan – that plan must address "Level I" criteria specified in the State chartering guidance.
- Based on acceptance of the Operator's business plan, the local WIB will issue the charter for a specific site to the Operator.

7. How do you deal with sites at different levels of chartering (as we go toward re-chartering)? How do we prioritize levels?

- A WIB does not necessarily need to have the same performance expectations for different sites in its area.
- Some *CareerLink* sites may be positioned to attract a more difficult population and would have performance goals adjusted accordingly.
- As different sites have different mixes of service partners, performance goals may differ.
- As with all matters related to *CareerLink* sites, success will depend on the quality of the ongoing dialogue between the WIB and the site Operator – beyond the Level I Criteria, continuous improvement will be a year-to-year negotiation between the Operator and the WIB.

8. What do you do with required partners who "won't play"?

- Local WIB should identify specific cases and report to State WIB and *CareerLink* Bureau for resolution
- If the partnership putting together a *CareerLink* is faced with a required partner who "won't pay", they should first seek assistance from their local WIB and local elected officials. If this is unsuccessful, it should be brought to the attention of the State WIB and State *CareerLink* staff.

REGARDING CHARTERING & COSTS AND COST ALLOCATIONS

- THE BEST PLANS SEEM TO BE THE ONES THAT ARE SIMPLE ALLOCATIONS OF SPACE – DEFINED COST FOR INDIVIDUAL PARTNERS' SPACE AND SHARING THE COST OF JOINT SPACE.
- LOCAL PARTNERS ARE ENCOURAGED TO TRY TO BUDGET FOR COMMON *CAREERLINK* COSTS SUCH AS MARKETING, STAFF DEVELOPMENT, ETC.
- MOST OF THE PARTNERS DO NOT CURRENTLY HAVE GOOD MECHANISMS FOR COSTS ASSOCIATED WITH UNITS OF SERVICE (I.E. THEY DON'T KNOW WHAT "INTAKE" OR A COUNSELING SESSION ACTUALLY COSTS) – WE NEED TO BECOME MORE SOPHISTICATED AT THIS CALCULATION.
- THE 'TRUE COST" OF WORKING WITH *CAREERLINK* NEEDS TO BE MARRIED TO THE "TRUE BENEFIT" FROM BEING THERE – PARTNERS ARE DIVERTING MONEY FROM OTHER AREAS TO PARTICIPATE IN *CAREERLINK*, SO THE RETURN-ON-INVESTMENT CALCULATION MUST WORK FOR THEM.
- PARTNERS WILL CONTINUE TO BE RESTRICTED, IN VARYING DEGREES, BY SERVICE REQUIREMENTS OF THEIR FUNDING SOURCES – THE OPERATOR MAY FIND IT HELPFUL TO ARRAY ALL PARTNER FUNDING SOURCES BY LEVEL OF RESTRICTIVENESS.
- JUST AS MOST *CAREERLINK* SITES DON'T HAVE ADEQUATE BASELINE NUMBERS FOR CLIENT SERVICE LEVELS AND OUTCOMES, MOST ALSO DO NOT HAVE JOINT BUDGETS FOR THE SITES – THIS, ALSO, NEEDS FURTHER DEVELOPMENT.

9. WHAT ABOUT "UNFUNDED MANDATES"? WHERE DO WE GET RESOURCES?

- WITH THE EXCEPTION OF LOCAL FUND-RAISING AND FEE-BASED ACTIVITIES, *CAREERLINK* SITES AND SERVICES ARE FUNDED BY EXISTING FUND SOURCES THAT HAVE BEEN RE-DIRECTED TO THE *CAREERLINK* SITES BECAUSE OF THE COST-EFFECTIVENESS OF SHARED AND INTEGRATED SERVICE STRUCTURES.
- PARTNERS, FOR THE MOST PART, SHOULD NOT VIEW INVESTMENT IN *CAREERLINK* AS ADDED COSTS, BUT RATHER AS FUNDS THAT ARE RE-DIRECTED TOWARD A MORE EFFECTIVE SERVICE STRUCTURE – EACH PARTNER SHOULD SEE A BETTER RETURN-ON-INVESTMENT FOR THE FUNDS SPENT ON INTEGRATED SERVICES.
- PARTNERS, TO OBTAIN HIGHER RETURN ON INVESTMENTS, WILL NEED TO VIEW *CAREERLINK* SITES AS AN INTEGRAL PART OF THEIR OPERATIONS – EACH PARTNER SHOULD MARKET THE *CAREERLINK* SITES AS PRIMARY CUSTOMER SERVICE SITES.
- NOT ALL PARENT ORGANIZATIONS OF STATE AGENCIES, WHICH SHOULD BE PART OF LOCAL *CAREERLINKS*, HAVE BUDGETED FUNDS IN SUPPORT OF *CAREERLINKS* AND HAVE GIVEN LOCAL MANAGERS FLEXIBILITY TO WORK WITH THEIR LOCAL PARTNERS. THE STATE WIB WILL BE ENCOURAGING THIS COOPERATION.

REGARDING *CAREERLINK* OPERATIONS

10. IS THE GOAL TO SERVE ALL CUSTOMERS, NOT JUST THE UNEMPLOYED (OR LOW-INCOME)?

- YES. THE *CAREERLINK* SITE, MUCH LIKE THE PUBLIC LIBRARY, SHOULD BE A RESOURCE FOR A WIDE RANGE OF EMPLOYED AND UNEMPLOYED PERSONS.
- TO APPEAL TO A WIDE RANGE OF INDIVIDUALS AND EMPLOYERS, THE *CAREERLINK* SITE AND STAFF MUST APPEAR PROFESSIONAL AND FRIENDLY, QUICKLY DIRECTING CUSTOMERS TO THE APPROPRIATE LEVEL OF SERVICE TO MEET THEIR NEEDS.

11. WHAT IS THE PLAN FOR INTENSIVE SERVICES?

- INTENSIVE SERVICE STRATEGIES WILL BE LOCALLY DETERMINED AND NEGOTIATED AMONG THE WIB, THE *CAREERLINK* OPERATOR, AND THE SERVICE PARTNERS.
- WHILE CORE SERVICES ARE OPEN TO EVERYONE (NO ELIGIBILITY TEST) AND ARE PRESENTED UNDER THE *CAREERLINK* LOGO (NOT ASSOCIATED WITH ANY PARTICULAR SERVICE PARTNER), INTENSIVE SERVICES WILL REQUIRE A SPECIFIC "QUALIFICATION" OR "ELIGIBILITY DETERMINATION" TO ACCESS. IN MANY CASES, IT IS APPROPRIATE TO IDENTIFY THE SPECIFIC ORGANIZATION AT THIS POINT AND THIS ORGANIZATION WILL TAKE THE LEAD ROLE.
- IT IS THE HOPE THAT MANY INTENSIVE SERVICES CAN BE DELIVERED ON-SITE AT THE *CAREERLINK* OFFICE – SOME SPECIALIZED SERVICES MAY BE OFFERED OFF-SITE AT PARTNERS' OTHER OFFICES.

12. HOW SHOULD EDUCATION PLAY IN SYSTEM, SINCE IT IS A MAJOR PART OF THE WORKFORCE DEVELOPMENT SYSTEM?

- A PROPERLY FUNCTIONING *CAREERLINK* SITE WILL PROMOTE CONTINUING EDUCATION AND LIFELONG LEARNING FROM THE BEGINNING OF THE PROCESS WITH BOTH ITS INDIVIDUAL AND BUSINESS CUSTOMERS.
- THE *CAREERLINK* SITE MUST ENSURE THAT IT PRESENTS ITSELF TO THE PUBLIC AS COMPLETELY OBJECTIVE IN ITS RELATIONSHIP WITH THE ENTIRE EDUCATION COMMUNITY, PUBLIC AND PRIVATE – THUS, ON-SITE EDUCATION PARTNERS, WHERE THEY EXIST IN THE *CAREERLINK* STRUCTURE, MUST POSITION THEMSELVES IN A WAY THAT DOES NOT JEOPARDIZE THIS OBJECTIVITY.
- A MAJOR EMPHASIS IN THE *CAREERLINK* STRUCTURE WILL BE ADVANCEMENT STRATEGIES FOR WORKERS WHO HAVE BEEN PLACED IN LOWER-WAGE, ENTRY-LEVEL JOBS – THIS SHOULD LEAD TO ONGOING DIALOGUE WITH THE EDUCATION COMMUNITY ON WORK-BASED EDUCATION STRATEGIES FOR INCUMBENT WORKERS.

13. HOW DO WE GET BETTER PERFORMANCE MANAGEMENT OF THE "SYSTEM"? WHERE DO WE GET MINIMUM CRITERIA?

- MOST OF THE EXISTING PERFORMANCE MEASURES ARE "STOVEPIPE" MEASURES OF INDIVIDUAL FUNDING SOURCES.

- A CRITICAL NEED IN THE SYSTEM IS TO ESTABLISH *CAREERLINK*-WIDE MEASURES THAT CUT ACROSS ALL FUNDING SOURCES.
- A NECESSARY FIRST STEP IS TO ESTABLISH A BASELINE (QUANTIFIED) OF SERVICE FLOWS AND SERVICE OUTCOME – THIS WILL FORM THE BASIS OF CONTINUOUS IMPROVEMENT DEFINITIONS AND DISCUSSIONS.

14. WILL *CAREERLINK* SITES ADEQUATELY SERVE CUSTOMERS WITH DISABILITIES?

- EACH SITE WILL ACTIVELY ENGAGE ITS VOCATIONAL REHABILITATION PARTNERS TO ASSIST IN THE SITE'S PREPARATION OF THE ADA COMPLIANCE PLAN. EACH SITE IS REQUIRED TO COMPLETE AN ADA COMPLIANCE PLAN AND A REVIEW TEAM WILL APPROVE THE PLAN. ALL *CAREERLINK* SITES MUST MEET COMPLIANCE STANDARDS.
- VOCATIONAL REHABILITATION PARTNERS CAN PLAY AN ACTIVE ROLE IN HELPING STAFF OF OTHER ORGANIZATIONS BETTER IDENTIFY PERSONS WITH DISABILITIES AND DIRECT THEM TO APPROPRIATE SPECIALIZED SERVICES.
- VOCATIONAL REHABILITATION AND *CAREERLINK* ARE PURCHASING HARDWARE AND SOFTWARE TO MAKE THE RESOURCE ACCESSIBLE FOR PEOPLE WITH DISABILITIES. THIS EQUIPMENT SHOULD BE IN PLACE BY 9-30-00. IN ADDITION "CUSTOMER SERVICE FOR PEOPLE WITH DISABILITIES" TRAINING WAS DEVELOPED BY THE WIA ACCESSIBILITY TASK GROUP AND ALL *CAREERLINK* STAFF MUST HAVE THIS TRAINING. VOCATIONAL REHABLITATION IS PROVIDING THE INSTRUCTORS.

REGARDING WIB RESPONSIBILITIES

15. WILL THE STATE OVERRIDE A LOCAL WIB'S DECISION ON ISSUING A CHARTER?

- ISSUING A CHARTER IS A LOCAL WIB'S RESPONSIBILITY.
- HE STATE SETS EXPECTATIONS FOR WIBS IN CARRYING OUT THEIR CHARTERING RESPONSIBILITIES – IF A WIB FAILS TO MEET THE STATE'S STANDARDS, THE STATE MAY TAKE ACTION, IN. CONSULTATION WITH THE LOCAL ELECTED OFFICIALS, TO REORGANIZE THE WIB

16. WHAT DECISIONS NEED TO BE MADE BY WIB IN ADVANCE OF CHARTERING?

- EACH WIB NEEDS TO START WITH THE STATE'S LEVEL I CRITERIA AND THEN OPERATIONALIZE THESE BY DEFINING CORE PERFORMANCE INDICATORS THAT WILL FORM THE BASIS OF CHARTERING AND THE ONGOING DISCUSSION WITH THE OPERATOR.
- ESSENTIALLY, EACH WIB WILL NEED TO CLEARLY DEFINE WHAT IT MEANS BY A QUALITY *CAREERLINK* SITE IN A GIVEN COMMUNITY, CONSISTENT WITH WIB NEEDS ANALYSIS FOR THAT COMMUNITY.

17. How do we deal with large issues – like transportation?

- These are policy issues and will need the attention of the local WIB. *CareerLink* staff shall make the WIBs aware of the implications of this kind of issue and be willing to work cooperatively with other community agencies on solutions.
- The WIBs are charged with the responsibility to deal with major workforce issues in the local regions.
- Effective WIBs often go through a process of prioritizing the major workforce issues and then forming issue-management task forces involving key community leaders.

18. Job rotation across companies and strategies to create self-sustaining work?

- The WIB table should be the place where economic development issues and worker advancement issues come together – strategies will be developed where employer productivity and worker skills/wage advance simultaneously.
- As mentioned in an earlier response, both the WIB and the *CareerLink* sites need to work on creative strategies for advancement of low-wage workers – this will, no doubt involve work-based education and cross-industry strategies for advancement of incumbent workers.

STATE RESPONSIBILITIES

19. Don't the state agencies need to set the stage for local areas (lead by example)?

- Yes. The State WIB is a focal point for multi-agency strategies toward common workforce goals.
- In some cases, information and instruction to local staff have been issued as joint-agency memos with all agency heads signing – more are expected as the *CareerLink* initiatives evolve.
- Local WIBs can also play a part by making the State WIB aware of policies and operational practices by state agencies that adversely affect the development and maintenance of working relationships at the local level, especially among partners in the *CareerLink* system.

20. What is the relationship between the State WIB and local WIBs?

- The State WIB advises the Governor on statewide workforce issues and coordinates data gathering and goal setting with the economic development community.
- The planning relationship that exists between the State WIB and the local WIBs is a key part of the system – it is a two-way street where the State WIB and local WIBs negotiate goals and agree to implementation strategies and accountability measures.
- The State WIB and the local WIBs share a key perspective – both are charged with seeking cooperation, coordination and accountability across multiple organizations and funding sources – in addition, both are led by representatives from the business community and view employers as a primary judge of system quality.

21. Are there chartering success stories in PA that can be shared?

- Yes. We will collect some of these and share them.

22. Incentives for performance?

- Both the state and the local WIBs will need to create strategies to reward quality service delivery. No doubt, more work needs to be done on this issue.